

**Thought Leaders**  
BUSINESS LAB

**EPISODE 246**

# **Client Expectation Management**

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## Mismatch of expectations

Despite your best efforts, you will inevitably encounter a client who doesn't meet your requirements or whose expectations you don't satisfy. When this happens, there will come a point where you feel unhappy about that client or vice versa.

Tim shared an example of a consultant who was charging about \$1500 per month for a client he hadn't met for several months. He felt like he was being paid without providing the service he was being paid for. However, the client was happy with the arrangement because the coach was on-hand when they needed his services.

When this happens, it's not about avoiding certain clients. It's about having a plan so you can manage this mismatch of expectations.

## When should you set up expectations?

Expectations should be laid out early on in the relationship.

A great time to do this is during the onboarding process, then periodically check-in with clients throughout your time working with them.

## New systems, new phases

When someone wants to implement a new system, it's better to roll out the delivery in phases. The foundation phase takes the most time with the least returns. This is also the part where many clients say they can't see any results.

To alleviate your clients' concerns, explain:

- the steps you will take in each phase,
- the expected outcomes, and
- the possible consequences if deliverables are delayed.

This will give context, keep your client in the loop and give them small wins along the way.

Make sure you set expectations for the timeframes of the phases.



## The 5-step process when things go off the rails



### 1. ACKNOWLEDGEMENT

Acknowledge that something in your systems and processes has fallen apart or has gaps. Examine the reason behind this issue so you know what to change and how to prevent it from happening again.

Don't be defensive. Thank your client for bringing the problem to your attention. By doing so, you can disarm the emotional context when you converse with your client.



### 2. EMPATHISE

Put yourself in their shoes, see things through their eyes and think through their perception.



### 3. CLARIFICATION

Understand what's going wrong and where it's going wrong to make sure that you and your client are on the same page.

Review the first expectations agreement and clarify the client's thoughts on the terms of the agreement.



### 4. WAY FORWARD

Create a plan to move forward. You may need to adjust the phases or initial agreements so things work better for you and your client.

Parting ways is also a viable plan if you've clarified the extent of your services.



### 5. AGREEMENT

You and your client need to agree on the way forward, and what the next steps will be.

## Give updates



Check-in with the client even if nothing is happening so you stop them from worrying.

## Use the 5-step process with anyone



You can use this procedure not just with clients, but with staff or suppliers as well.



You can apply it in any situation where there's a mismatch of expectations.

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